

Provider Data Import (PDI)

CSV Specifications Document

Build 145

I. Overview

The Provider Data Import (PDI) is designed to provide an easy 'intermediate step' in the complicated process of importing data from other applications into CAREWare. Standardized CSV files will be able to easily map to and import client-related data. The PDI also

employs a value mapping system that allows users to send their own values and map them to existing CAREWare values. Note that values sent which match native CAREWare values will be automatically mapped to those values.

* For legacy purposes, CAREWare will retain the ability to import Access files, but those file structures will not be updated in future builds. The latest build specification for those file types is build 80.

1. The Files

The PDI utilizes a system of CSV files, each of which has a specific column structure to import a specific CAREWare entity. Thus, there will be a file structure for client records, one for services, diagnoses, etc. All CSV files will be expected to be in the standard format described in RFC 4180. Users will be able to upload single CSV files or zip files containing multiple files, including attachments for custom fields.

See [File Specifications](#) for more information.

2. The Data

Exporters are recommended to include any record that was added, edited, or deleted since the most recent export. The export files can contain data from any range of dates, though it will be important for the central site to be able to know the chronological sequence of the export files. The import process will add new records and edit or delete existing records based on rules for each record type. If there is an existing record based on these values, it will be updated to match the incoming record. Otherwise, a new record will be added. An existing record will be deleted if it matches an existing one and the *is_delete* field is set to 'yes'.

CLIENT records will be imported and matched based on the client's URN (this value is generated by CAREWare based on the client's first name, last name, gender, and dob). An incoming client record that generates the URN of an existing client will be treated as the same client and the existing client record may be updated based on options chosen by the user running the import (see below).

Client records should be included if they have been added or edited since the last export. Deletion of client records will not be handled through the export/import process.

ADAP ENROLLMENT HISTORY records the ADAP enrollment history of clients. This table is only used for ADAP provider domains. This table is matched to client, date, and domain.

ANNUAL REVIEW This table has been deprecated in CAREWare 6. Only Annual Review custom field data will be imported. Records are matched on client and year. Any number of annual custom fields can be imported in a record. Custom fields must conform to the custom field specifications established in [File Specifications](#).

APPOINTMENT records will be matched on: client, domain, service type and date. An appointment will be considered a match if the date is within + or – 1 day of the date of the incoming record.

ATTACHMENTS records will be matched to attachment list, date, and domain.

CASE NOTE records will be matched on: client, date and domain. NOTE: If an existing case note is a match, the existing note will be overwritten, not appended to.

COUNSELING AND TESTING records will be matched on: client, test date, and domain.

CUSTOM SUBFORM records will be matched on: client, date, and domain.

DIAGNOSIS records will be matched on: client, date, domain, and diagnosis code.

DRUG PAYMENT records will be matched on: client, date, domain, and NDC for drug overlaps. User can set a drug overlap days in the import settings to determine whether a drug is overlapped.

ELIGIBILITY records will be matched on: client, date, domain, and eligibility code.

FORM DESIGN DATA records will be matched on: client, date, domain, and form design code.

IMMUNIZATION records will be matched on: client, date, domain, and immunization code.

INSURANCE ASSESSMENT records will be matched on: client, date and domain. If there is an existing record, its values are updated based on the options chosen by the user (mentioned in NOTE above). The values in *exp_insurance_assessment* take precedence over the values entered in the respective fields of *exp_annual_review*.

MEDICATION records will be matched on: Client, Medication Code, Start Date and Strength. Any matching records that are found will be treated as the same record and updated accordingly.

MESSAGE records will be matched on client, date, and domain.

OUT OF POCKET EXPENSE records will be matched on client, date, and domain.

POVERTY LEVEL ASSESSMENT records will be matched on client, date and domain. The values in *exp_poverty_level_assessment* take precedence over those entered in the corresponding fields of *exp_annual_review*.

PREGNANCY records will be matched on: client, domain, and estimated conception date. If there is an existing record with an Estimated Conception date within 30 days of the incoming record, then this will be treated as the same record and updated.

PROVIDER records import the provider data for funding sources, grantee information, and other information created using the setup wizard during the provider setup.

REFERRAL records will be matched on: client, date referred, (*referred from*) domain, service category, referred-to site.

RELATIONS records will be matched on: domain, index client, and dependent client.

SERVICE records will be matched based on: client, domain, service date, and subservice. Receipt records will be brought in with each Service record. Note regarding service contracts - If there is a value in the *srv_contract_name* field, then this value **MUST** match to the name of a valid contract for the domain (a valid contract is one where the subservice is active for the contract and the service date falls between the start and end dates of the contract). If no value is entered in the contract name, then there must be exactly one valid contract for the subservice and date of service.

SHARING REQUEST records will be matched on client, date, and domain.

TEST records will be matched on: client, date, domain, and test definition.


VITAL SIGN records will be matched to client, date, and domain.


Provider Data Import Options


Administrative Options > Data Import and Export Features > PDI > PDI Configure Provider > tester


Configure Service Matching Custom Fields Save Cancel


tester


Adding new clients: Automatically add 


Client Matching: Client eURN 


Client custom Field: 

Updating Demographic Data: Always update 


Update Race: Always update 

Update Risk Factors: Always update 

Update Insurance Types: Always update 

Handling Insurance: Do not use insurance 

Number of days used to determine drug overlap: 0

Service Matching: Standard - services are unduplicated from file to file 

Match services on custom field:

Service Custom Fields Selected: No Custom Fields Selected

Update Provider Information:

Automatic Import:

Match CAREWare Values:

Automatically Import Setup Data:

Delete Completed Records After Process:

Adding new clients

- Automatically add new clients (Default) – CAREWare using the client matching choice to determine if a client record is a new client and adds that client. If there is a similar record, users will be prompted to match that client to a record in CAREWare in PDI Details.
- Manually add new clients – Users will be prompted to match imported client records to records in CAREWare before records can be processed.
- Discard unmatched client records – CAREWare will automatically reject any associated data for clients that do not automatically match using the client matching option specified in import settings

Client Matching

- Client eURN (default) – Matches clients on the encrypted unique identifier in CAREWare generated using the client’s first name, last name, dob, and gender.
- Client ID – Matches clients using an ID value set by users for that provider domain.
- Custom Field – Matches clients based on a custom field selected from the drop down list.

Updating Demographic Data

- Always update (Default) – CAREWare uses the imported data to update the clients record.
- Never Update – CAREWare only uses the exp_client primary key to match client records and makes no changes to demographics records using the imported data.
- Update only for NEW clients – Ignores imported demographics records for clients that are a match to records already in CAREWare.
- Only update new values – Only updates values for matched client records for clients in CAREWare, when there is a change to that clients record. Update Race
- Always update (Default) – Uses the values included in the import file to update all race records for the client.
- Never Update – Ignores race fields when updating client records.
- Update only for True values – Only updates if a value is entered for a race field. Ignores blank values.

Update Risk Factors

- Always update (Default) – Uses the values included in the import file to update all risk factors for the client.
- Never Update – Ignores risk factors when updating client records.
- Update only for True values – Only updates if a value is entered for an risk factors. Ignores blank values.

Update Insurance Types

- Always update (Default) – Uses the values included in the import file to update all insurance records for the client.
- Never Update – Ignores insurance types when updating client records.
- Update only for True values – Only updates if a value is entered for an insurance type. Ignores blank values.

ADAP Import Options

How to Handle Insurance

- Use the insurance type specified... - Imported insurance records override the clients current insurance in CAREWare.
- Use the client's current insurance type... - Ignores imported insurance records.
 - Do not use insurance – Ignores imported insurance records.

Number of days used to determine drug overlap

Set the number of days to use when determining if a client has a drug overlap. – Based on the drug payment date, drug payment duration, and current drug payment records for the client in CAREWare. If an overlap occurs for a drug payment record, an error will occur in the PDI Details stating “Drug overlap detected for drug – 54569580500”. 54569580500 is an example of an NDC number for a drug payment during an ADAP import.

Record Type	Record PK	Error Text
DrugPayment	1	Drug overlap detected for drug - 54569580500

Service Options

Service Matching

- Standard – Matches service records based on the service date and subservice code. Ignores duplicate services.
- Always add – CAREWare imports all service records with a matching client. This may lead to duplicate services being imported.
- Service PK – Matches using the srv_pk value.
- Match on custom field – Services are matched using a custom service field selected by clicking *Configure Service Matching Custom Fields* and saving a selection.

Administrative Options > Data Import and Export Features > PDI > Configure Provider

Configure Service Matching Custom Fields Save Cancel

Configure Provider

Adding new clients: Automatically add [down arrow]

Client Matching: Client eURN [down arrow]

Client custom Field: [text box]

Administrative Options > Data Import and Export Features > PDI > Configure Provider

Save Cancel Print or Export

Search: [text box]

Use Field	Name	Control Type	Description
<input type="checkbox"/>	12-step self-help	CheckBox	12-step self-help
<input type="checkbox"/>	abdominal pain	CheckBox	abdominal pain
<input type="checkbox"/>	Addressed?	CheckBox	Was the adherence
<input type="checkbox"/>	ADHD/hyperactivity	CheckBox	Pregnancy Intake
<input type="checkbox"/>	ADHD/hyperactivity	TextBox	Pregnancy Intake

Provider Data Options

- Automatic Import – CAREWare will process any records that are ready to process automatically.
- Match CAREWare values – CAREWare matches imported records based on CAREWare values reducing the number of missing mapping values.
- Automatically Import Setup Data – Imports a provider domains setup data using meta data tables in the import file.
- Delete Completed Records after Process – CAREWare will purge processed records from the holding tanks.

II. File Specification Information

All CSV files will be expected to be in the standard format described in RFC 4180.

Each file matches the data structure of one table from the previous MDB template

- The file name should match the name of the table in the template
- The first row must contain column names, and those names must match those in the specification document and sample files
 - Column ordering does not matter
- Columns that are not required may be excluded from files (any assumed default values will be noted for each)
- Each CSV file will prepend first_name, last_name, gender_cs, gender_cs_def_code, dob, urn_suffix, and match_id as the first 7 columns (see sample files)
 - first_name, last_name, gender, and dob (Date of Birth) comprise the **URN fields** CAREWare uses to match to uniquely identify a client
 - urn_suffix is used to distinguish different clients with matching URN (not required, blank values will be treated as “U”)
 - To import a record, either all 4 URN fields must all be populated or the match_id field must have a value
 - Records without complete URN fields can be processed (they will match to client via match_id), but new clients can only be added when URN fields for the record are complete
 - match_id can contain ClientID or a custom field value, and is required if using one of those two client matching options
 - Values for match_id are not required if using URN matching
 - The mtd_ files do not need the client fields, as they are not related to clients
 - Custom field columns must start with the prefix ‘cst_’
 - Custom field names should conform to ‘safe field names’ (spaces and special characters are removed) – the CAREWare PDI has functionality to create a sample template file based on selected custom fields
 - Any number of custom fields can be added to the file

Users will be able to upload single CSV files or zip files containing multiple files

- If the ZIP file includes file attachments, the attachments will be stored in a folder called 'attachments'
- There will be no requirement for the entire list of possible tables (files) to be in the ZIP file, nor will there be a restriction for including CSV tables with zero records

- The import file parser will be able to determine which tables (files) are included based upon the file name and handle them appropriately
- If there are any files in the import file outside of the attachments folder that do not match a PDI table name, the import will be rejected

Coding Systems

Clinical data related tables use a Coding System (CS) to allow for automatic value matching during import. Fields that use CS values will have paired `_cs` and `_def_code` columns for each value. The `_cs` column specifies the coding system to use to interpret the value, while the `_def_code` specifies the value code itself. Note that the CS column is not required; if CS is not specified then the standard value mapping system will be used during the import process. Remember that for columns that are not required, the values for those columns may be null, or the column may be omitted entirely from the file.

Some tables allow more than one CS value per record. In these cases, the column names will be specified as `_cs_1` and `_cs_1_def_code`. Additional column pairings in that file would be specified as `_cs_2`, `_cs_2_def_code`, `_cs_3`, `_cs_3_def_code`,...etc. Note for these tables that the pairings should be used in order. I.e, if there is no value for `_cs_1_def_code`, then the import will not look for values in `_cs_2_def_code`, etc. Any limits to the number of column pairings will be specified on the table specification.

Coding System Examples

Sample header row for a client record supplying ethnicity and two races per client:

cln_pk,cln_last_name,cln_first_name,cln_dob,cln_gender_cs,cln_gender_cs_def_code,cln_race_cs_1,cln_race_cs_1_def_code,cln_ethnicity_cs,cln_ethnicity_cs_def_code

Required fields for each record in this file: *cln_pk,cln_last_name,cln_first_name,cln_dob,cln_gender_cs_def_code*

Sample header row for a service file entering up to 3 services for a client for each row in the file:

srv_pk,last_name,first_name,dob,gender_cs,gender_cs_def_code,srv_date,srv_cs_1,srv_cs_1_def_code,srv_cs_2,srv_cs_2_def_code,srv_cs_3,srv_cs_3_def_code

Required fields for each record in this file: *srv_pk,last_name,first_name,dob,gender_cs_def_code,srv_date,srv_cs_1_def_code*

III. File by File Specifications

exp_provider.csv

Field Name	Data Type	Size	Required	Description/Comment
prv_pk	Text	38	Yes	Used to uniquely identify the record.
prv_name	Text	60	Yes	This name will be used to verify the domain the file will be imported into.
prv_source	Text	60	Yes	Source for the domain the file will be imported into.

exp_client.csv

Field Name	Data Type	Size	Required	Description/Comment
cln_pk	Text	38	Yes	Used to uniquely identify a client record.
cln_eurn	Text	20	No*	Encrypted URN (usually nine characters). Required if cln_first_name or cln_last_name is blank.
cln_urn_suffix	Text	1	No***	Used to distinguish multiple clients with the same URN.
cln_client_id	Text	16	No *****	Domain specific identification field for clients.
cln_last_name	Text	40	No	Required if cln_eurn is blank and import settings are matching on URN
cln_first_name	Text	25	No	Required if cln_eurn is blank and import settings are matching on URN
cln_middle_name	Text	25	No	New field holds 25 characters, but initial is acceptable.
cln_street	Text	50	No	Street Address
cln_city	Text	30	No	City
cln_state	Text	75	No	State abbreviations and FIPS codes will be automatically mapped
cln_county	Text	50	No	FIPS code will be automatically mapped (must be a valid county code for the given State). If no state is given then this must be null as well.
cln_zip	Text	10	No	Client Zip code
cln_phone	Text	25	No	Client Phone

cln_dob	Date/Time	n/a	Yes	Full dob is required.
cln_dob_estimated	Yes/No	n/a	No	Signifies whether or not the dob is an estimate.
cln_gender_cs	Text	30	No	Coding System for gender value
cln_gender_cs_def_code	Text	20	Yes	Client's current gender. Code for: <ul style="list-style-type: none"> • 1 - Male • 2 - Female • 3 - Transgender Unk • 4 - Transgender MtF • 5 - Transgender FtM • 6 - Refused to Report • 9 - Unknown
cln_ethnicity_cs	Text	50	No	Coding System for Ethnicity value
cln_ethnicity_cs_def_code	Text	20	No**	Code for client's ethnicity (Hispanic, Non-Hispanic, Unknown)
cln_risk_msm	Yes/No	n/a	No*	Men who have Sex with Men; now a separate Boolean value.
cln_risk_idu	Yes/No	n/a	No*	Intravenous Drug Use; now a separate Boolean value.
cln_risk_hetero	Yes/No	n/a	No*	Heterosexual contact; now a separate Boolean value.
cln_risk_hemo	Yes/No	n/a	No*	Hemophilia/coagulation disorder; now a separate Boolean value.
cln_risk_perinatal	Yes/No	n/a	No*	Perinatal transmission; now a separate Boolean value.
cln_risk_transfusion	Yes/No	n/a	No*	Receipt of transfusion of blood, blood components, or tissue; now a separate Boolean value.
cln_risk_other	Yes/No	n/a	No*	Now a separate Boolean value.
cln_risk_other_description	Text	40	No	Description of the "other" risk; now a separate Boolean value.
cln_risk_unknown	Yes/No	n/a	No*	Now a separate Boolean value.
cln_vital_status	Text	20	No**	Code for: <ul style="list-style-type: none"> • 1 - Alive • 3 - Deceased • 4 - Unknown Enrollment Status is now a separate value.
cln_date_of_death	Date/Time	n/a	No	

cln_enrollment_status	Text	20	No**	Code for: <ul style="list-style-type: none"> • 1 – Active • 2 – Inactive/Case Closed (deprecated) • 3 – Referred or Discharged • 4 – Removed • 5 - Incarcerated • 6 - Relocated • 9 - Unknown (deprecated)
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cln_enrollment_date	Date/Time	n/a	No	Date of client's first enrollment.
cln_date_case_closed	Date/Time	n/a	No	Case closed date
cln_hiv_status	Text	20	No **	Code for: <ul style="list-style-type: none"> • 1 - HIV-positive (not AIDS) • 2 - HIV-positive (AIDS status unknown), • 3 - CDC defined AIDS, • 4 - HIV-negative (affected), • 5 - HIV-indeterminate, or • 9 – Unknown (deprecated)
cln_hiv_date	Date/Time	n/a	No	The date on which the client was diagnosed HIV+.
cln_hiv_date_est	Yes/No	n/a	No*	Yes if the HIV+ date is an estimate.
cln_aids_date	Date/Time	n/a	No	The date on which the client was diagnosed with AIDS.
cln_aids_date_est	Yes/No	n/a	No*	Yes if the AIDS date is an estimate.
cln_date_art_first_prescribed	Date/Time	n/a	No	Date client was first prescribed ARV medications.

cln_pre_art_reason	Text	20	No	Code for explanation of why client was not prescribed ART after diagnosed with HIV: <ul style="list-style-type: none"> • 1 - Treatment not medically indicated per guidelines, • 2 - Client not ready (as determined by clinician), • 3 - Client refused therapy, or • 4 - Other extenuating circumstances (e.g. inadequate insurance, ability to pay)
cln_med_allergies	Text	255	No	Free text description of any allergies to medications.
cln_notes	Memo	n/a	No	Free text for additional client notes
cln_encrypted_UCI	Text	50	No	If URN fields are supplied then this value is not used (it is generated from the URN).
cln_adap_application_date	Date/Time	n/a	No	Date of received ADAP application
cln_race_cs_1	Text	50	No	Coding System for Race value 1 (multiple entries allowed)
cln_race_cs_1_def_code	Text	50	No	Race value 1 (multiple entries allowed)
cln_hiv_risk_label	Text	50	No	Alternate method for importing Risk Factors. This text value will be mapped to one or more values for Risk Factors during import.

cln_birth_gender	Text	20	No	Gender at birth. Code for: <ul style="list-style-type: none"> • 1 - Male • 2 - Female
cln_hispanic_subgroup	Text	50	No	Only imported if cln_hispanic = "1". Code for: <ul style="list-style-type: none"> • 1 – Mexican, Mexican American, Chicano/a • 2 - Puerto Rican • 3 - Cuban • 4 – Another Hispanic, Latino/a or Spanish origin **** See Note below
cln_pacific_subgroup	Text	50	No	Only imported if cln_race_pacific = Yes. Code for: <ul style="list-style-type: none"> • 1 – Native Hawaiian • 2 – Guamanian or Chamorro • 3 - Samoan • 4 - Other Pacific Islander **** See Note below

cln_asian_subgroup	Text	50	No	Only imported if cln_race_asian = Yes. Code for: <ul style="list-style-type: none"> • 1 – Asian Indian • 2 - Chinese • 3 – Filipino • 4 – Japanese • 5 – Korean • 6 – Vietnamese • 7 – Other Asian **** See Note below
cln_phone_type	Text	50	No	Phone Type Code for: <ul style="list-style-type: none"> <input type="checkbox"/> 01 - Home • 02 - Mobile • 03 - Work • 04 - Fax
cln_mailing_street	Text	50	No	Street Address
cln_mailing_city	Text	30	No	City
cln_mailing_state	Text	75	No	FIPS code for the state. See exp_state_rft table
cln_mailing_zip	Text	10	No	Client Zip code
cln_mailing_phone_1	Text	25	No	Phone number
cln_mailing_phone_1_type	Text	50	No	Phone Type Code for: <ul style="list-style-type: none"> • 01 - Home • 02 - Mobile • 03 - Work • 04 - Fax
cln_mailing_phone_2	Text	25	No	Phone number
cln_mailing_phone_2_type	Text	50	No	Phone Type Code for: <ul style="list-style-type: none"> <input type="checkbox"/> 01 - Home • 02 - Mobile • 03 - Work • 04 - Fax
cln_primary_diagnosis_code	Text	7	No	Diagnosis Code in Billing Information in Insurance Assessment for Annual Review used for billing module.

cln_primary_diagnosis_date	Date/Time	n/a	No	Date of Diagnosis in Billing Information in Insurance Assessment for Annual Review used for billing module.
cln_common_notes	Memo	n/a	No	General comments for users.
cln_preferred_name	Text	25	No	Preferred name this client uses
cln_match_id	Text	255	No	Provides an optional, alternate way to link to clients from other files

* All Boolean fields are required by CAREWare. A null value will be interpreted as FALSE.

** CAREWare dropdown lists that specify an Unknown option do not permit null values. Any left null will be interpreted as "Unknown."

*** Null value will default to 'U'

****These are placeholder positions. For each racial subgroup that is true place a "1" and for each racial subgroup that is false place a "0". (I. e., a client is Puerto Rican and Cuban. You will place a 0110 in the Hispanic Subgroup column.)

***** If the provider data import option is set to match clients based on Client ID, then this field is required. Matching clients based on Client ID is an option to replace matching clients on URN.

exp_adap_enrollment_history.csv

Field Name	Data Type	Size	Required	Description/Comment
first_name	Text	25		Client first name
last_name	Text	40		Client last name
gender_cs	Text	50	No	Coding System for Gender
gender_cs_def_code	Text	20	Yes	Code for current Gender
dob	Date			Client date of birth
urn_suffix	Text	1		Client URN suffix (to distinguish different clients with matching URNs)
match_id	Text	255		Required if URN fields are not complete
adp_en_hs_pk	Text	38	Yes	Uniquely identifies each record.
adp_en_hs_date	Date/Time	n/a	Yes	Date of enrollment update

adp_en_hs_status_code	Text	50	No	Code for current enrollment status: <ul style="list-style-type: none"> • 01 - Enrolled, receiving services • 02 - Enrolled, on waiting list • 03 - Enrolled, services not requested • 04 - Disenrolled • 05 - Legacy Enrolled • 06 - Legacy Disenrolled NOTE: 05 and 06 are only for historical purposes. These are not valid values for current data.
adp_en_hs_disenroll_code	Text	55	No	Code for disenrollment reason: <ul style="list-style-type: none"> • 01 - Ineligible, change in ADAP program FPL requirements • 02 - Ineligible for ADAP, now eligible for Medicaid • 03 - Ineligible, other reason • 04 - Did not recertify • 05 - Did not fill prescription • 06 - Deceased • 07- Dropped out, no reason given • 08 - Other/Unknown • 09 - Ineligible due to change in ADAP eligibility • 10 - Ineligible for ADAP, no longer meets ADAP eligibility
adp_en_hs_other_disenroll_code	Text	100	No	Code for other disenrollment reason
adp_en_hs_delete	Yes/No	n/a	No*	Yes if this record has been deleted at the provider and should be deleted in CAREWare.

exp_annual_review.csv (used for Annual Custom and Quarterly Custom Fields)

Field Name	Data Type	Size	Required	Description/Comment
first_name	Text	25		Client first name
last_name	Text	40		Client last name
gender_cs	Text	50	No	Coding System for Gender
gender_cs_def_code	Text	20	Yes	Code for current Gender
dob	Date			Client date of birth

urn_suffix	Text	1		Client URN suffix (to distinguish different clients with matching URNs)
match_id	Text	255		Required if URN fields are not complete
ann_rv_pk	Text	38	Yes	Unique ID for each record
ann_rv_year	Text	4	Yes	
ann_rv_q1_substance_abuse_hst_code	Text	20		
ann_rv_q2_substance_abuse_hst_code	Text	20		
ann_rv_q3_substance_abuse_hst_code	Text	20		
ann_rv_q4_substance_abuse_hst_code	Text	20		
ann_rv_q1_substance_abuse_trt_status	Text	20		
ann_rv_q2_substance_abuse_trt_status	Text	20		
ann_rv_q3_substance_abuse_trt_status	Text	20		
ann_rv_q4_substance_abuse_trt_status	Text	20		
ann_rv_q1_mental_health_hst_code	Text	20		
ann_rv_q2_mental_health_hst_code	Text	20		
ann_rv_q3_mental_health_hst_code	Text	20		
ann_rv_q4_mental_health_hst_code	Text	20		
ann_rv_q1_mental_health_trt_status	Text	20		
ann_rv_q2_mental_health_trt_status	Text	20		
ann_rv_q3_mental_health_trt_status	Text	20		
ann_rv_q4_mental_health_trt_status	Text	20		

exp_appointment.csv

Field Name	Data Type	Size	Required	Description/Comment
first_name	Text	25		Client first name
last_name	Text	40		Client last name

gender_cs	Text	50	No	Coding System for Gender
gender_cs_def_code	Text	20	Yes	Code for current Gender
dob	Date			Client date of birth
urn_suffix	Text	1		Client URN suffix (to distinguish different clients with matching URNs)
match_id	Text		255	Required if URN fields are not complete
app_pk	Text	50	Yes	Uniquely identifies each record.
app_delete	Yes/No	n/a	No*	Yes if this record has been deleted at the provider and should be deleted in CAREWare.
app_date	Date/time	n/a	Yes	Date of the appointment.
app_amount	Currency	n/a	No	Amount of any payment collected.
app_employee	Text	100	No	Employee creating the appointment.
app_comment	Memo	n/a	No	Free text used to supply additional information.
app_sent_to_employee	Text	100	No	Employee the client was sent to contact.
app_subservice	Text	100	Yes	Service which is the purpose of the appointment.

exp_attachments.csv

Field Name	Data Type	Size	Required	Description/Comment
att_pk	Text	36	Yes	Uniquely identifies each record.
att_file_name	Text	255	Yes	Name of the file
att_cnt_tp_label	Text	35	Yes	Content type of this attachment
att_comment	Text	100	No	Comments on this attachment.
att_file_date	Date/Time	n/a	Yes	Date of the file
att_attach_date	Date/Time	N/a	Yes	Date file was attached
att_file_type	Text	5	Yes	Type of file. i.e. PDF, DOC, TXT, etc.
att_record_fk	Text	38	No	Unique foreign key to the parent record for this attachment
att_field_location_rfk	Text	2	No	Location of parent record (01=Client, etc)
att_custom_field_name	Text	50	No	Name of custom control for this attachment

exp_case_note.csv

Field Name	Data Type	Size	Required	Description/Comment
first_name	Text	25		Client first name
last_name	Text	40		Client last name
gender_cs	Text	50	No	Coding System for Gender
gender_cs_def_code	Text	20	Yes	Code for current Gender
dob	Date			Client date of birth
urn_suffix	Text	1		Client URN suffix (to distinguish different clients with matching URNs)
match_id	Text	255		Required if URN fields are not complete
cas_nt_pk	Text	38	Yes	Uniquely identifies each record
cas_nt_date	Date/Time	n/a	Yes	Date the note was entered
cas_nt_note	Memo	n/a	Yes	Text of the note
cas_nt_employee	Text	100	No	Employee entering this case note
cas_nt_delete	Yes/No	n/a	No*	Yes if this record has been deleted at the provider and should be deleted in CAREWare

exp_counseling_testing.csv

Field Name	Data Type	Size	Required	Description/Comment
first_name	Text	25		Client first name
last_name	Text	40		Client last name
gender_cs	Text	50	No	Coding System for Gender
gender_cs_def_code	Text	20	Yes	Code for current Gender
dob	Date			Client date of birth
urn_suffix	Text	1		Client URN suffix (to distinguish different clients with matching URNs)
match_id	Text	255		Required if URN fields are not complete

cns_ts_pk	Text	38	Yes	Primary key for the record that must be unique.
cns_ts_pre_counsel_code	Text	50	No	Indicates whether or not there was pretest counseling.
cns_ts_pre_counsel_date	Date/Time	n/a	No	Date of pretest counseling.
cns_ts_post_counsel_code	Text	50	No	Indicates whether or not there was post-test counseling.
cns_ts_post_counsel_date	Date/Time	n/a	No	Date of post-test counseling.
cns_ts_reason_no_post_counsel	Text	50	No	The reason the client was not given post-test counseling.
cns_ts_post_counsel_referred	Yes/No	n/a	No	Indicates whether or not there was post-test counseling.
cns_ts_hiv_tested	Text	50	No	Indicates whether or not the client was HIV tested.
cns_ts_hiv_tested_result	Text	50	No	The results of HIV testing
cns_ts_hiv_tested_date	Date/Time	n/a	No	Date of the HIV test.
cns_ts_pn_offered	Text	50	No	Indicates whether or not the client was offered partner notification services.
cns_ts_pn_number	Number	n/a	No	The number of partners notified.
cns_ts_comment	Text	255	No	Additional comments added by the user.
cns_ts_delete	Yes/No	n/a	No	Yes if this record has been deleted at the provider and should be deleted in CAREWare.

exp_custom_subform.csv

Field Name	Data Type	Size	Required	Description/Comment
first_name	Text	25		Client first name
last_name	Text	40		Client last name
gender_cs	Text	50	No	Coding System for Gender
gender_cs_def_code	Text	20	Yes	Code for current Gender
dob	Date			Client date of birth
urn_suffix	Text	1		Client URN suffix (to distinguish different clients with matching URNs)
match_id	Text	255		Required if URN fields are not complete
cst_sb_pk	Text	38	Yes	Primary key for the record that must be unique.
cst_sb_date	Date/Time	N/A	Yes	Date of custom subform record
cst_sb_cst_sb_tb_key	Text	38	Yes	Foreign key to the cw_custom_subform_tab table.
cst_sb_cst_sb_tb_name	Text	100	Yes	Label of custom subform tab

cst_sb_delete	Text	N/A	No	Yes if this record has been deleted at the provider and should be deleted in CAREWare.
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exp_diagnosis.csv

Field Name	Data Type	Size	Required	Description/Comment
first_name	Text	25		Client first name
last_name	Text	40		Client last name
gender_cs	Text	50	No	Coding System for Gender
gender_cs_def_code	Text	20	Yes	Code for current Gender
dob	Date			Client date of birth
urn_suffix	Text	1		Client URN suffix (to distinguish different clients with matching URNs)
match_id	Text	255		Required if URN fields are not complete
dgn_pk	Text	38	Yes	Uniquely identifies each record.
dgn_delete	Yes/No	n/a	No*	Yes if this record has been deleted at the provider and should be deleted in CAREWare.
dgn_cs_1	Text	50	No	Coding System for Diagnosis 1 (multiple entries allowed)
dgn_cs_1_def_code	Text	50	Yes	Diagnosis Code 1 (multiple entries allowed)
dgn_assessment	Text	50	No	Code for:
				<ul style="list-style-type: none"> • 1 - Definitive • 2 - Presumptive • 3 - Unknown
dgn_date	Date/Time	n/a	Yes	Date the diagnosis was given
dgn_comment	Text	255	No	Free text that can be used to supply additional information about the diagnosis.
dgn_problem	Text	75	No	Medical issue resulting in diagnosis
dgn_problem_status	Text	50	No	Status of client's problem
dgn_date_resolved	Date/Time	N/A	No	Date of when problem was resolved

exp_drug_payment.csv

Field Name	Data Type	Size	Required	Description/Comment
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first_name	Text	25		Client first name
last_name	Text	40		Client last name
gender_cs	Text	50	No	Coding System for Gender
gender_cs_def_code	Text	20	Yes	Code for current Gender
dob	Date			Client date of birth
urn_suffix	Text	1		Client URN suffix (to distinguish different clients with matching URNs)
match_id	Text	255		Required if URN fields are not complete
drg_py_pk	Text	38	Yes	Uniquely identifies each record.
drg_py_delete	Yes/No	n/a	No	Yes if this record has been deleted at the provider and should be deleted in CAREWare. Null value is false.
drg_py_ndc	Text	11	Yes	Standardized NDC
drg_py_date	Date/Time	38	Yes	Date of disbursement
drg_py_quantity	Number	n/a	No	Must be <> 0 (a negative value is an adjustment)
drg_py_unit_price	Currency	n/a	No*	Must be >= 0. If null, will be calculated from total. (This should be null if total is supplied)
drg_py_total	Currency	n/a	No*	Defaults to 0 if total and unit price are Null. If total is null and unit price is supplied, this will be calculated from unit price and quantity.
drg_py_dispenser_code	Text	50	Yes	Unique key identifying the dispenser for this record.
drg_py_funding_code	Text	50	Yes	Unique key identifying the drug funding.
drg_py_insurance_code	Text	50	No	Client's reported insurance type for this disbursement.
drg_py_comments	Text	255	No	Place any comments you have about the drug payment here
drg_py_dispense_fee	Currency	n/a	No	Dispensing fee for this disbursement.
drg_py_duration	Number	n/a	Yes	Number of days covered by this disbursement.

* - Either unit price OR total should be supplied. If both have values, then unit price will be ignored and will be calculated from total and quantity during import.

NOTE: NDC values will not be mapped; these are expected to be the correct standardized NDC. Records without a valid NDC will be flagged with the appropriate error code. Note that a given NDC must be active in the CAREWare formulary in order to be valid for import.

exp_eligibility.csv

Field Name	Data Type	Size	Required	Description/Comment
first_name	Text	25		Client first name
last_name	Text	40		Client last name

gender_cs	Text	50	No	Coding System for Gender
gender_cs_def_code	Text	20	Yes	Code for current Gender
dob	Date			Client date of birth
urn_suffix	Text	1		Client URN suffix (to distinguish different clients with matching URNs)
match_id	Text	255		Required if URN fields are not complete
elg_pk	Text	38	Yes	Uniquely identifies each record.
elg_date	Date/Time	N/A	Yes	Date of change to client's eligibility status
elg_yes_no_code	Text	50	Yes	Eligibility status confirmation reference code
elg_elg_cs_code	Text	50	No	Eligibility status custom reference code
elg_comment	Text	255	No	Any comments the user wishes to enter.
elg_delete	Yes/No	N/A	No	
elg_fnd_sr_code	Text	60	Yes	Eligibility status funding reference code

exp_form_design_data.csv

Field Name	Data Type	Size	Required	Description/Comment
first_name	Text	25		Client first name
last_name	Text	40		Client last name
gender_cs	Text	50	No	Coding System for Gender
gender_cs_def_code	Text	20	Yes	Code for current Gender
dob	Date			Client date of birth
urn_suffix	Text	1		Client URN suffix (to distinguish different clients with matching URNs)
match_id	Text	255		Required if URN fields are not complete
frm_ds_pk	Text	38	Yes	Uniquely identifies each record.
frm_ds_data_date	Date/Time	N/A	No	Date from FormData
frm_ds_form_data_pk	Text	38	No	PK from the fd_form_data record. This must be a GUID.
frm_ds_form_design_name	Text	50	No	Form Design name from FormDesign

frm_ds_mapping_table_name	Text	50	No	from FormControlDataMap
frm_ds_map_record_fk	Text	38	Yes	PK of the actual record (service, test, etc) from Form[Test/Service/etc]Map
frm_ds_delete	Text	Yes/ Jo	No	Yes to delete existing record
frm_ds_control_id	Text	100	No	Identifies the control this record is tied to, can be ID or display name

exp_immunization.csv

Field Name	Data Type	Size	Required	Description/Comment
first_name	Text	25		Client first name
last_name	Text	40		Client last name
gender_cs	Text	50	No	Coding System for Gender
gender_cs_def_code	Text	20	Yes	Code for current Gender
dob	Date			Client date of birth
urn_suffix	Text	1		Client URN suffix (to distinguish different clients with matching URNs)
match_id	Text	255		Required if URN fields are not complete
imm_pk	Text	38	Yes	Uniquely identifies each record.
imm_delete	Yes/ No	n/a	No*	Yes if this record has been deleted at the provider and should be deleted in CAREWare.
imm_cs_1	Text	50	No	Coding System for Insurance 1 (multiple entries allowed)
imm_cs_1_def_code	Text	50	Yes	Code for the specific diagnosis. The master list is created and maintained by the central administrator.
imm_received_code	Text	20	Yes	Determines whether the immunization was given. CAREWare values: <ul style="list-style-type: none"> • 1 - Yes • 2 - NMI • 3 - No • 4 - Refused

imm_date	Date/Time	n/a	Yes	Date the immunization was given
imm_immunity_code	Text	50	No	Code for any immunity: <input type="checkbox"/> 01 - Immune <ul style="list-style-type: none"> • 02 - Nonimmune • 03 - History of infection • 04 - History of vaccination • 99 - Unknown
imm_admin_amount	Text	20	No	Amount Administered
imm_admin_units	Text	20	No	Unit for the amount Administered
imm_manufacturer_name	Text	200	No	Name of the Vaccine Manufacturer
imm_manufacturer_code	Text	20	No	Code of the Vaccine Manufacturer
imm_lot_number_	Text	20	No	Lot Number of the Immunization/Vaccine

exp_insurance_assessment.csv

Field Name	Data Type	Size	Required	Description/Comment
first_name	Text	25		Client first name
last_name	Text	40		Client last name
gender_cs	Text	50	No	Coding System for Gender
gender_cs_def_code	Text	20	Yes	Code for current Gender
dob	Date			Client date of birth
urn_suffix	Text	1		Client URN suffix (to distinguish different clients with matching URNs)
match_id	Text	255		Required if URN fields are not complete
ins_as_pk	Text	38	Yes	Uniquely identifies each record.
ins_as_cs_1	Text	50	No	Coding System for Insurance 1 (multiple entries allowed)

ins_as_cs_1_def_code	Text	50	Yes	Insurance Code (multiple entries allowed) NOTE – def_code_1 will be saved as the primary insurance; codes 2,3,...etc. will be added as secondary insurances. Native CAREWare codes: <ul style="list-style-type: none"> • 1 Private (Deprecated) • 2 Medicare (unspecified) • 3 Medicaid • 5 No Insurance • 6 Other • 7 Medicare Part A/B • 8 Medicare Part D • 10 Private - Employer • 11 Private - Individual • 13 VA, Tricare and other military health care • 14 IHS • 15 Medicare Part C • 16 High Risk Insurance • 17 Association Plan
ins_as_other_insurance	Text	50	No	Stores the value of the 'other' insurance if 'ins_as_ins_tp_other' is chosen
ins_as_date	Date/Time	n/a	Yes	Date the insurance record was added
ins_as_delete	Yes/No	n/a	No	If set, it will delete the record
ins_as_full_lis	Yes/No	n/a	No	Full LIS Secondary Insurance
ins_as_high_risk_pool	Yes/No	n/a	No	

exp_medication.csv

Field Name	Data Type	Size	Required	Description/Comment
first_name	Text	25		Client first name
last_name	Text	40		Client last name
gender_cs	Text	50	No	Coding System for Gender
gender_cs_def_code	Text	20	Yes	Code for current Gender

dob	Date			Client date of birth
urn_suffix	Text	1		Client URN suffix (to distinguish different clients with matching URNs)
match_id	Text	255		Required if URN fields are not complete
mdc_pk	Text	38	Yes	Uniquely identifies each record.
mdc_delete	Yes/No	n/a	No*	Yes if this record has been deleted at the provider and should be deleted in CAREWare.
mdc_cs_1	Text	50	No	Coding System for Medication 1 (multiple entries allowed)
mdc_cs_1_def_code	Text	120	Yes	Medication Code (multiple entries allowed)
mdc_units	Number	n/a	No	Number of does given
mdc_strength	Number	n/a	No	Strength of each does
mdc_frequency	Text	20	No	Code for (See Appendix C for a description of codes): <input type="checkbox"/> 01 – qd

				<ul style="list-style-type: none"> • 02 – bid • 03 – tid • 04 – qid • 05 – prn • 06 – qw • 07 – biw • 08 – tiw • 09 – qow • 10 – qod • 11 – qh • 12 – qhs • 13 – qm • 14 – q6h • 15 – q12h
mdc_start_date	Date/Time	n/a	Yes	Date medication started for client
mdc_end_date	Date/Time	n/a	No	Null for continuing medication.

mdc_indication	Text	20	No	Code for: <ul style="list-style-type: none"> • 01 – ART • 02 – OI Prophylaxis • 03 – OI Treatment • 99 - Other
mdc_prophylaxis	Text	20	No	Code for: <ul style="list-style-type: none"> • 01 – Pneumocystis carinii pneumonia (PCP) • 02 – M. avium complex (mac) • 03 – M. tuberculosis (Mtb) • 04 – Candida • 05 – Cytomegalovirus (CMV) • 06 – Toxoplasma gondii • 07 – Varicella zoster virus (VZV) • 08 - Other
mdc_discontinue_reason	Text	20	No	Code for: <ul style="list-style-type: none"> • 01 - Virologic Failure • 02 - Toxicity • 03 - Intolerance

				<ul style="list-style-type: none"> • 04 - Lost to followup • 05 - Dose Change • 06 - Other • 07 - Therapy completed • 08 - Improved immune function • 09 - Unknown • 10 - Stock out/supply disruption • 11 - Managed treatment interruption • 12 - Non-adherent • 13 - Immunologic Failure • 14 - Pregnant • 15 - Risk of Pregnancy • 16 - Newly diagnosed TB • 17 - Availability of New Drug • 18 - Illness or hospitalization • 19 - Patient lacks sufficient financial resource • 20 - Patient decision
mdc_comment	Text	50	No	Free text that can be used to supply additional information.
mdc_icd10_code	Int		No	Optional ICD10 code for this medication
mdc_instructions	Text	35	No	Instruction for client's medication

exp_message.csv

Field Name	Data Type	Size	Required	Description/Comment
first_name	Text	25		Client first name
last_name	Text	40		Client last name
gender_cs	Text	50	No	Coding System for Gender
gender_cs_def_code	Text	20	Yes	Code for current Gender
dob	Date			Client date of birth
urn_suffix	Text	1		Client URN suffix (to distinguish different clients with matching URNs)
match_id	Text	255		Required if URN fields are not complete
mss_pk	Text	38	Yes	Primary Key of the record.

mss_to_provider	Text	60	Yes	Sent to Provider
mss_from_user	Text	100	No	Sent from User
mss_to_user	Text	100	Yes	Sent to User
mss_send_date	Date/Time	N/A	Yes	Date message was sent
mss_message	Memo	N/A	Yes	Message text
mss_received	Yes/No	N/A	No	True if message has been acknowledged
mss_received_date	Date/Time	N/A	No	Date message was received
mss_resolved	Yes/No	N/A	No	True if message has been resolved
mss_resolved_date	Date/Time	N/A	No	Date message was resolved

exp_out_of_pocket_expense.csv

Field Name	Data Type	Size	Required	Description/Comment
first_name	Text	25		Client first name
last_name	Text	40		Client last name
gender_cs	Text	50	No	Coding System for Gender
gender_cs_def_code	Text	20	Yes	Code for current Gender
dob	Date			Client date of birth
urn_suffix	Text	1		Client URN suffix (to distinguish different clients with matching URNs)
match_id	Text	255		Required if URN fields are not complete
out_pc_pk	Text	38	Yes	Primary Key of the record.
out_pc_description	Text	150	No	Explanation of the expense
out_pc_amount	Double	8	No	Dollar value for the expense

out_pc_delete	Yes/No	N/A	No	Yes if this record has been deleted at the provider and should be deleted in CAREWare.
out_pc_date	Date/Time	N/A	Yes	Date the expense occurred

exp_poverty_level_assessment.csv

Field Name	Data Type	Size	Required	Description/Comment
first_name	Text	25		Client first name
last_name	Text	40		Client last name
gender_cs	Text	50	No	Coding System for Gender
gender_cs_def_code	Text	20	Yes	Code for current Gender
dob	Date			Client date of birth
urn_suffix	Text	1		Client URN suffix (to distinguish different clients with matching URNs)
match_id	Text	255		Required if URN fields are not complete
pvr_lv_pk	Text	38	Yes	Uniquely identifies each record.
pvr_lv_household_income	currency	n/a	Yes	\$0.00 - \$999,999,999.99
pvr_lv_household_size	number	n/a	Yes	1-9999
pvr_lv_date	Date/Time	n/a	Yes	Date the poverty level record was added
pvr_lv_delete	Yes/No	n/a	No*	If set, it deletes poverty level record
pvl_lv_individual_income	Currency	N/a	No	\$0.00 - \$999,999,999.99. This field is for the individual income of the client separate from the household income

exp_pregnancy.csv

Fieldname	Data Type	Size	Required	Description/Comment
first_name	Text	25		Client first name

last_name	Text	40		Client last name
gender_cs	Text	50	No	Coding System for Gender
gender_cs_def_code	Text	20	Yes	Code for current Gender
dob	Date			Client date of birth
urn_suffix	Text	1		Client URN suffix (to distinguish different clients with matching URNs)
match_id	Text	255		Required if URN fields are not complete
prg_pk	Text	38	Yes	Not used by the import process; only useful for user reference.
prg_delete	Yes/No	n/a	No*	Yes if this record should be deleted.
prg_est_conception_date	Date/Time	n/a	Yes	Estimated date of conception.
prg_pn_care_date	Date/Time	n/a	No	Date prenatal care began for this pregnancy.
prg_pn_visits	Number	n/a	No	Number of prenatal visits during this pregnancy.
prg_pn_art_counsel	Text	20	No	Was client counseled for ART? Code for: <ul style="list-style-type: none"> • 0 - No • 1 - yes • 9 - Unknown
prg_pn_art_offered	Text	20	No	Was ART offered to the client? Code for: <ul style="list-style-type: none"> • 0 - No • 1 – yes • 9 - Unknown
prg_pn_art_taken	Text	20	No	Was ART taken? Code for: <ul style="list-style-type: none"> • 0 - No • 1 – yes • 9 - Unknown
prg_pn_art_date	Date/Time	n/a	No	Date ART was started. Should only have a value if prg_pn_art_taken = 'yes'

prg_outcome	Text	20	No	Code for: <ul style="list-style-type: none"> • 01 – Live Birth • 02 – Therapeutic (induced) abortion • 03 – Spontaneous abortion (miscarriage) • 04 – Stillbirth • 05 - Unknown
prg_delivery_date	Date/Time	n/a	No	
prg_newborn_status	Text	20	No	HIV Status of newborn. Code for: <ul style="list-style-type: none"> • 0 – Negative • 1 – Positive • 2 – Indeterminate • 9 – Unknown/unreported

exp_referral.csv

Field Name	Data Type	Size	Required	Description/Comment
first_name	Text	25		Client first name
last_name	Text	40		Client last name
gender_cs	Text	50	No	Coding System for Gender
gender_cs_def_code	Text	20	Yes	Code for current Gender
dob	Date			Client date of birth
urn_suffix	Text	1		Client URN suffix (to distinguish different clients with matching URNs)
match_id	Text	255		Required if URN fields are not complete

rfr_pk	Text	38	Yes	Not used by the import process; only useful for user reference.
rfr_delete	Yes/No	n/a	No*	Yes if this record has been deleted at the provider and should be deleted in CAREWare.
rfr_referred_to	Text	60	Yes	Code for the agency to which the referral was made. This field will be used for both internal and external referrals. The master list, which combines internal and external providers, is created and maintained by the central administrator.

rfr_service_category	Text	255	No	Code for: <ul style="list-style-type: none"> • 001 - Outpatient/Ambulatory Health Services • 002 - Oral Health Care • 003 - Mental Health Services • 004 - Substance Abuse: Outpatient • 007 - Rehabilitation Services • 011 - Hospice Services • 014 - Respite Care • 015 - Emergency Financial Assistance • 016 - Housing Services • 017 - Food Bank/Home-delivered Meals • 018 - Medical Transportation Services • 019 - Service Outreach • 022 - Health ed./risk reduction/prevention • 025 - Medical Nutrition Therapy • 026 - Child Care Services • 029 - Psychosocial Support • 030 - Substance Abuse: Residential • 031 - Early Intervention Services • 032 - Referral: Health Care/Supportive • 037 - AIDS Pharmaceutical Assistance • 038 - Home Health Care • 039 - Home and Community-based Health Services • 040 - Medical Case Management • 041 - Case Management (non-medical) • 043 - Other Professional Services • 044 - EHE Initiative Services
rfr_cs_1	Text	50	No	Coding System for Referral 1 (multiple entries allowed)
rfr_cs_1_def_code	Text	127	Yes	Referral Code (multiple entries allowed)
rfr_date_referred	Date/Time	n/a	Yes	The date on which the referral was made.
rfr_status	Text	38	No*	Code for: <ul style="list-style-type: none"> <input type="checkbox"/> 01 - Pending • 02 - Completed • 03 - Lost to follow up • 04 - Rejected
rfr_date_received	Date/Time	n/a	No	The date on which the referred service was provided.

rfr_class	Text	60	No	Code for a customizable list of referral classes.
rfr_comment	Text	255	No	Free text that can be used to supply additional information about the referral.

* default value for referral status is completed

exp_relations.csv

Field Name	Data Type	Size	Required	Description/Comment
first_name	Text	25		Client first name (Index Client)
last_name	Text	40		Client last name (Index Client)
gender_cs	Text	50	No	Coding System for Gender
gender_cs_def_code	Text	20	Yes	Code for current Gender
dob	Date			Client date of birth (Index Client)
urn_suffix	Text	1		Client URN suffix (to distinguish different clients with matching URNs)
match_id	Text	255		Required if URN fields are not complete (Index Client)
rt_pk	Text	38	Yes	Uniquely identifies each record.
rt_dependant_first_name	Text	25		Client first name
rt_dependant_last_name	Text	40		Client last name
rt_dependant_gender_cs	Text	50		Coding System for Gender
rt_dependant_gender_cs_def_code	Text	20		Code for current Gender
rt_dependant_dob	Date			Client date of birth
rt_dependant_urn_suffix	Text	1		Client URN suffix (to distinguish different clients with matching URNs)
rt_dependant_match_id	Text	255		Required if URN fields are not complete
rt_relation_type	Text	50	Yes	Code/label for the relation the dependent client has with the index client.
rt_delete	Yes/No	n/a	No*	Yes if this record has been deleted at the provider and should be deleted in CAREWare.

For each record specified in the file, the import would add two client records based on the URN details specified and create a relation record linking those

exp_service.csv

Field Name	Data Type	Length	Required	Description/Comment
first_name	Text	25		Client first name
last_name	Text	40		Client last name
gender_cs	Text	50	No	Coding System for Gender
gender_cs_def_code	Text	20	Yes	Code for current Gender
dob	Date			Client date of birth
urn_suffix	Text	1		Client URN suffix (to distinguish different clients with matching URNs)
match_id	Text	255		Required if URN fields are not complete
srv_pk	Text	38	Yes	Uniquely identified each record in an import file
srv_delete	Yes/No	n/a	No*	Yes if this record has been deleted at the provider and should be deleted in CAREWare
srv_cs_1	Text	50	No	Coding System for Service 1 (multiple entries allowed)
srv_cs_1_def_code	Text	176	Yes	Service Code (multiple entries allowed)
srv_date	Date/Time	n/a	Yes	Date of service provided
srv_quantity	Single	n/a	No*	Number of service units. Must be <> 0.
srv_price	Currency	n/a	No*	Unit price. CAREWare multiplies this times quantity to calculate a total
srv_contract_name	Text	50	No	Specifies which contract the service is attached to. NOTE: An error will occur if a value is provided and it does not match a valid contract name.
srv_category	Text	100	No	Label for the service category to which this service entry belongs. *This field is not imported*
srv_billing_employee	Text	100	No	Employee setup record with Third Party Billing Settings completed.
srv_billing_start_time	Date/Time	n/a	No	Date and time service visit began. Used to calculate units of service provided.
srv_billing_end_time	Date/Time	n/a	No	Date and time service visit ended. Used to calculate units of service provided.
srv_receipt_1_date	Date/Time			Multiple Receipts are allowed for a service. This would be Receipt1 for Service*****
srv_receipt_1_amount	Currency			

srv_receipt_1_source	Text	50		
srv_receipt_1_is_oop	Yes/No			True if this receipt was paid Out Of Pocket
srv_receipt_1_delete	Yes/No			True to delete this receipt

* All Boolean fields are required by CAREWare. Any left null will be interpreted as FALSE.

** The quantity field defaults to 1 if no value is supplied.

*** Price defaults to \$0 if no values are supplied.

****Deprecated

***** Service Receipts will be added to the first service record specified in the coding system

exp_sharing_request.csv

Field Name	Data Type	Size	Required	Description/Comment
first_name	Text	25		Client first name
last_name	Text	40		Client last name
gender_cs	Text	50	No	Coding System for Gender
gender_cs_def_code	Text	20	Yes	Code for current Gender
dob	Date			Client date of birth
urn_suffix	Text	1		Client URN suffix (to distinguish different clients with matching URNs)
match_id	Text	255		Required if URN fields are not complete
shr_rq_pk	Number	Int	Yes	Primary Key of the record.
shr_rq_from_provider	Text	60	Yes	Shared from provider
shr_rq_to_provider	Text	60	No	Shared with provider
shr_rq_start_date	Date/Time	N/A	No	Share start date
shr_rq_end_date	Date/Time	N/A	No	Share end date
shr_rq_sharing_type	Text	50	Yes	Type of data to be shared. <ul style="list-style-type: none"> • 1 - Clinical • 2 - Service • 3 - Case notes • 4 - Custom Subform • 5 - Form Designer • 6 - Appointment
shr_rq_delete	Yes/No	N/A	No	True if this existing record should be deleted

exp_test.csv

Field Name	Data Type	Size	Required	Description/Comment
first_name	Text	25		Client first name
last_name	Text	40		Client last name
gender_cs	Text	50	No	Coding System for Gender
gender_cs_def_code	Text	20	Yes	Code for current Gender
dob	Date			Client date of birth
urn_suffix	Text	1		Client URN suffix (to distinguish different clients with matching URNs)
match_id	Text	255		Required if URN fields are not complete
tst_pk	Text	38	Yes	Uniquely identifies each record.
tst_delete	Yes/No	n/a	No*	Yes if this record has been deleted at the provider and should be deleted in CAREWare.
tst_cs_1	Text	50	No	Coding System for Test 1 (multiple entries allowed)
tst_cs_1_def_code	Text	50	Yes	Test Code (multiple entries allowed)
tst_cs_1_val_code	Text	72	Yes	Test Result Code. This can be either a) a qualitative result code, which will be mapped to an existing value or coding system value or b) a quantitative (numeric) test result. Note that the following operators can be prepended to quantitative results: <, <=, =, >=, >. So, for example, a value of "<200" would be an acceptable test result.
tst_date	Date/Time	n/a	Yes	Date of the test (This is usually the date the specimen was collected)
tst_comment	Memo	n/a	No	Free text that can be used to supply additional information about the test.
tst_titer	Text	10	No	Include if the test produces a titer result.
tst_action_code	Text	200	No	Code for Action taken for this test. Will be mapped to a CAREWare test action.
tst_score	Number	Float	No	Number for Screening test scores

* All Boolean fields are required by CAREWare. Any left null will be interpreted as FALSE.

exp_vital_sign.csv

Field Name	Data Type	Size	Required	Description/Comment
first_name	Text	25		Client first name
last_name	Text	40		Client last name
gender_cs	Text	50	No	Coding System for Gender
gender_cs_def_code	Text	20	Yes	Code for current Gender
dob	Date			Client date of birth
urn_suffix	Text	1		Client URN suffix (to distinguish different clients with matching URNs)
match_id	Text	255		Required if URN fields are not complete
vtl_sg_pk	Text	38	Yes	Uniquely identifies each record.
vtl_sg_delete	Yes/No	n/a	No*	Yes if this record has been deleted at the provider and should be deleted in CAREWare.
vtl_sg_date	Date/Time	n/a	Yes	Date the value was recorded.
vtl_sg_vital_name	Text	50	No	Code for the type of value recorded in each record. Valid values: <input type="checkbox"/> Height <input type="checkbox"/> Weight <ul style="list-style-type: none"> • Pulse • Systolic • Diastolic • Temperature • NumVisits • NumHospitalDays • NumERVisits
vtl_sg_value	Number	n/a	No	Recorded value for the specified vital sign.
vtl_sg_notes	Text	75	No	Additional notes for this record.

Appendix A: Medication Frequency Codes

Frequency	Multiplier *	Description
qd	1	Every day (<i>quaque die</i>)
bid	2	Twice a day (<i>bis in die</i>)
tid	3	Three times a day (<i>ter in die</i>)
qid	4	Four times a day (<i>quater in die</i>)
prn	<none>	As Necessary (<i>pro re nata</i>)
qw	0.1428571	Once a Week (q = <i>quaque</i>)
biw	0.2857143	Biweekly
tiw	0.4285714	Three Times in a Week
qow	0.0714285	Every Other Week
qod	0.5	Every Other Day
qh	24	Every Hour (<i>quaque hora</i>)
qhs	1	Every Bedtime (<i>quaque hora somni</i>)
qm	1	Every Morning
q6h	4	Every 6 Hours
q12h	2	Every 12 Hours

* The Multiplier is a translation of the frequency into a number that indicates times per day